[S] | Flex

Mobile State eCitation and State Crash Forms Manual

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Spillman® Public Safety Software

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Preface

Welcome to the *Mobile State eCitation and State Crash Forms Manual*.

This manual describes how to create State eCitation (Citation) and State Crash (Crash) forms electronically in Mobile with information from your database. The electronic forms for Citation and Crash are available for Spillman Flex.

> **NOTE**
>
> The ability to create Citation and Crash forms is available only to select states. Contact your Spillman Client Services representative for more information.

Using this manual

This manual provides the following information:

- Chapter 1 provides instructions for the general user, such as creating and reviewing the Citation and Crash forms, and searching in Mobile for the information used in the forms.
- Chapter 2 provides instructions on the administrative tasks involved in setting up the software for the electronic forms, including user privileges and setting up workflow for state submission.

Other manuals

The *Mobile User Manual* provides information for the general user on how to use Mobile. The *Mobile Administration Manual* provides information for the Spillman Application Administrator (SAA) at your agency about how to set up and maintain the Mobile module, including how to set up translation codes. The *Application Setup and Maintenance Manual* provides procedures for installing and maintaining the software. The *Code Table Setup and Maintenance Manual* provides information for adding and maintaining your agency's code tables. The *Security Setup and Maintenance Manual* provides information for protecting your agency's system and setting up system privileges.

Windows basics

Before using the software, be familiar with the standard features of Microsoft® Windows®. At a minimum, know how to do the following:

- Use a mouse or keyboard to perform basic tasks, such as choosing menu options and buttons
- Work with windows, such as selecting, minimizing, restoring, maximizing, sizing, scrolling, closing, and so forth
- Work with dialog boxes

If these tasks are unfamiliar, then refer to your Windows online documentation or complete an online Window tour.

Manual conventions

When using this manual, note the following conventions.

Convention	Meaning/Use	Examples
bold	Used for names of options, text boxes, buttons, fields, and other items that are displayed on the screen.	**OK** is a button on the screen. Click **OK** or press Enter.
angle bracket (>) between items	Shows the menu option(s) that must be selected, in sequence, to get to a specific option.	From the Start menu, select **All Programs > Spillman > Spillman Mobile**.
plus sign (+) between keys	Used for keys that are pressed at the same time. Hold down the first key, and then press the other key(s). When a keystroke is available for a mouse action, both the mouse action and the keystroke are presented.	Press Ctrl+E. Click **Close** or press Ctrl+F4.
comma (,) between keys	Used for keys that are pressed in sequence. Press and release each key, in the order shown.	Press Alt, F, O to open the File Options dialog box.
`Courier font`	Used for displayed text.	The software prompts: `Are you sure you want to delete this record?`
`bold Courier font`	Used for information you enter.	Enter the street address, such as **`401 W Sycamore St`**.
italics	Used for emphasis. Used for variable information you supply.	Enter the date, using the *mm/dd/yyyy* format.

The following boxes indicate special information.

NOTE

Notes call attention to information that is of particular importance or that varies depending on a particular condition, such as the way your Spillman Application Administrator (SAA) has configured the software.

TIP

Tips present recommendations, optional actions, and additional ways to perform specific tasks.

CAUTION

Cautions point out actions that might endanger your data or its integrity (usefulness) or cause other problems later.

Features on your computer depend on your software version, modules, and privileges. Actual screens on your computer might vary from the example screens shown in this manual. However, any differences are minor and do not affect the tasks being described.

To find more manuals, visit MySpillman or the Spillman Knowledgebase.

Chapter 1

User Information

Jump to topic:

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Introduction

In Mobile, State eCitation (Citation) and State Crash (Crash) forms can be created and submitted electronically. After searching Name, Vehicle, and Property records in Mobile, information from the search results can be easily transferred to the electronic form using drag-and-drop mouse actions or keyboard commands. In addition, the forms can set up for approval through workflow or printed.

> **NOTE**
>
> The ability to create Citation and Crash forms is available only to select states. Contact your Spillman Client Services representative for more information.

To create a Citation or Crash form, complete the following tasks:

- “Creating a New Form” on page 13
- “Adding Record Information to the Form” on page 18
- “Completing Additional Form Details” on page 20
- “Maintaining Records in the Form” on page 25
- “Maintaining Records in the Form” on page 25
- “Validating and Submitting the Form” on page 30
- “Using Review Mode” on page 37
- “Retrieving Draft Forms” on page 44
- “Working in Offline Mode” on page 45
- “Working in Offline Mode” on page 45
- “Viewing the Record for the Form” on page 51

> **NOTE**
>
> In general, the process for accessing and using the Citation and Crash forms is the same. Any differences are noted. The majority of examples used in this manual refer to the Citation form.

Creating a New Form

The Citation and Crash forms are accessed through the Field Reporting screen in Mobile.

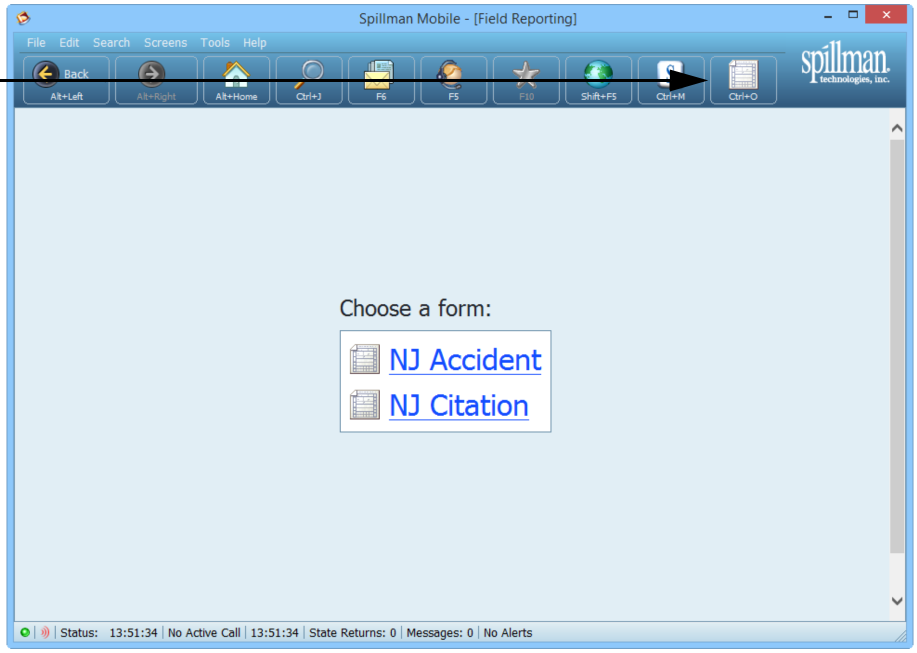
To create a new form:

1. From the Mobile Today screen, click the **Field Reports** (Ctrl+O) button.

> **NOTE**
>
> Depending on the size of your screen, the **Field Reports** button might not be visible. If necessary, click the double-chevron located on the toolbar to select **Field Reports**.

The Field Reporting screen opens.

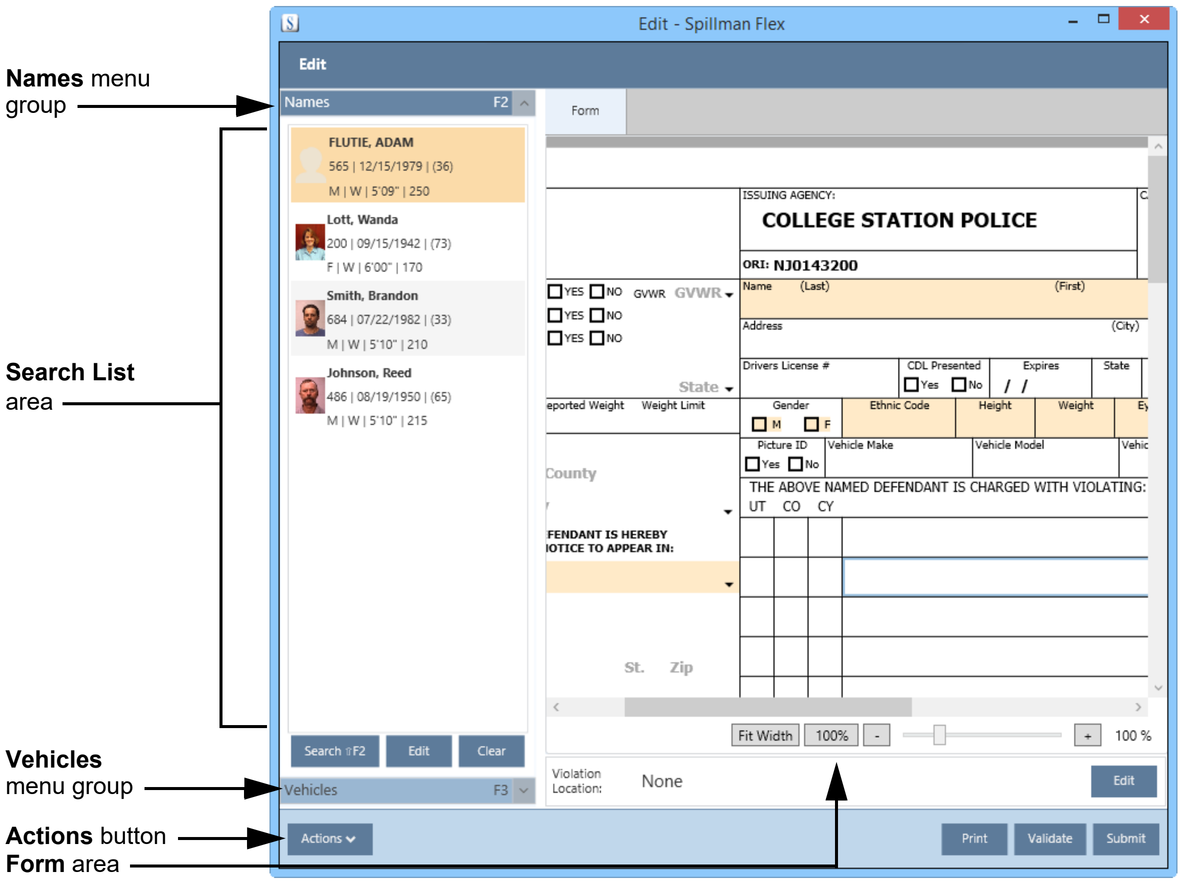
Field Reports button



2. Click the link for the type of form to create.

> **NOTE**
>
> For the Citation form, when the link is clicked, a dialog box might open stating that the system needs to grab record numbers. Click **OK** to automatically retrieve a range of record numbers. For more information, contact your SAA.

The selected form opens in Edit mode.



In Edit mode, the screen is divided into two main areas: **Search List** and **Form**. The **Search List** area on the left contains the **Names** and **Vehicles** menu groups, while the **Form** area on the right contains the selected electronic form.

The form looks like the paper form for the state, and is organized by blocks of information, such as the **Person** or **Vehicle** blocks, which are used when transferring the corresponding data directly from a record into the form.

3. Add information to the form from the appropriate Name and Vehicle records. See "Adding Record Information to the Form" on page 18.

> **NOTE**
>
> Information from a CAD call or Law Incident record can also be imported to the form. For more information, see "Importing CAD call information" on page 16 and "Importing a Law Incident record" on page 17.

4. Depending on the settings established by your SAA, the **Actions** button might provide additional options in Edit mode. For more information, see "Using the Actions buttons" on page 15.
5. Add any other information required by your state. See "Completing Additional Form Details" on page 20.
6. Validate and submit the form according to your agency's requirements. See "Validating and Submitting the Form" on page 30.

Using the Actions buttons

Depending on the settings established by your SAA, the **Actions** button might provide the following options in Edit mode:

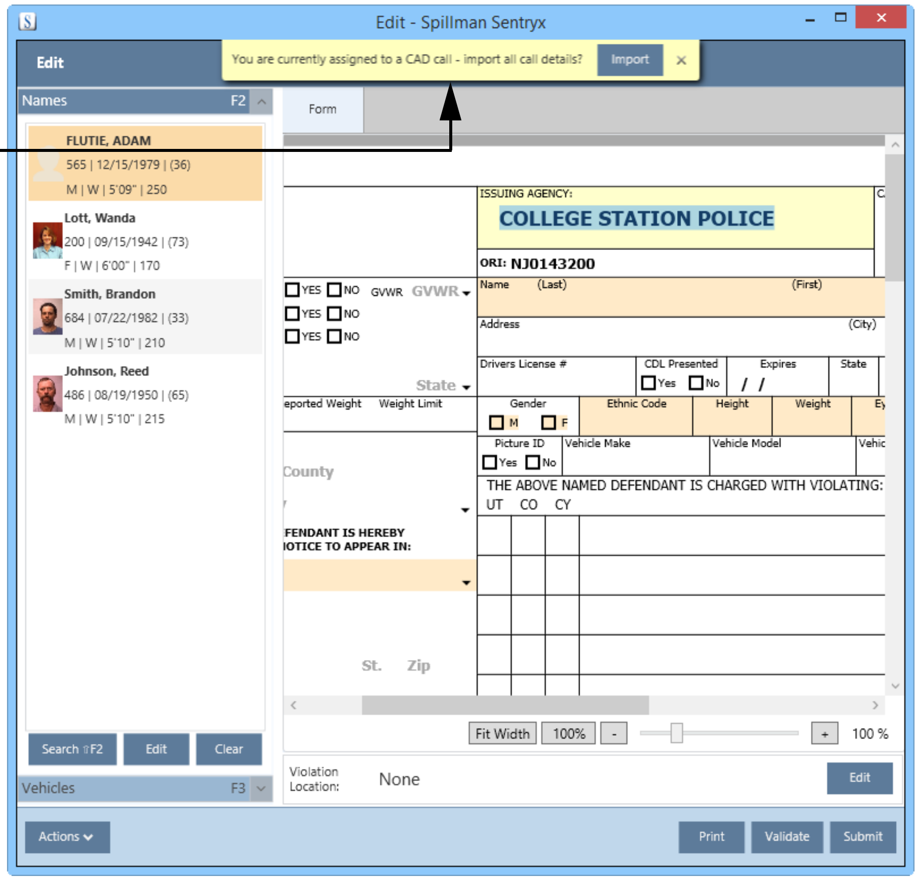
- **Import CAD Call.** Imports your current CAD call after the Import CAD Call prompt disappears. For more information, see "Importing CAD call information" on page 16.
- **Import Incident.** Imports Law Incident records if the form could not be completed at the time of the call. For more information, see "Importing a Law Incident record" on page 17.
- **Save as Default**. Saves the current form and any completed fields as the default form. To create a default form, complete any fields that have the same values each time a form is completed, and then select this option. If a default form is saved, then it opens in Edit mode whenever a new form is created.
- **Clear Form.** Clears any completed fields in the form.

> **NOTE**
>
> The options described for the **Actions** button are available to all states, in general. If your state has specific Edit mode requirements that are not described here, then see your SAA for further assistance.

Importing CAD call information

If a CAD call is assigned when the form is opened, then a prompt is displayed at the top of the form with the **Import** button, asking whether to import details from the CAD call to the form.

Import CAD call prompt



Clicking the **Import** button adds any Name or Vehicle records linked to the call through an involvement to the **Search List** area. The offense date and violation location are populated in the form, and call data is imported to the applicable fields. If the location is validated, then the location or address fields on the form are populated as well.

Importing CAD call information is optional. The prompt disappears after a few seconds or can be closed manually by clicking the **Close** icon.

To import your current CAD call after the prompt disappears, click the **Actions** button, and then select **Import CAD Call**.

> **NOTE**
>
> If the CAD call is for the current traffic stop or accident, then importing the call details is encouraged. If the CAD call is for a different incident, then the prompt can be ignored.

Importing a Law Incident record

If the form cannot be completed at the time of the call, then the Law Incident record from the call can be imported at a later time.

To import a Law Incident record:

1. With the form open in Edit mode, click the **Actions** button.
2. Select **Import Incident**.

   The Recent Searches list is displayed.
3. Do one of the following:
   - Select a record from the Recent Searches list.
   - If the desired record is not in the Recent Searches list, then click **New Search** to open the Law Search screen and search for the record. Once the desired record is selected from the search results, it appears in the Recent Searches list. If the desired record cannot be found, then complete the form manually.

   The Name and Vehicle record information from the selected record is imported to the **Search List** area. The offense date and violation location are populated in the form, and the call data is imported to the applicable fields. If the location is validated, then the location or address fields on the form are populated as well.

Adding Record Information to the Form

Name and Vehicle records from recent searches are used to complete fields in the **Person** and **Vehicle** blocks of the form. Depending on the form type selected, multiple blocks might be available to complete.

> **NOTE**
>
> Only local records are able to be used for the form. Any other record types, including StateLink returns, Insight queries, or bar code scans must be imported prior to being used.

When records are added to the form, data from database fields is populated into the corresponding form fields. For example, data in the **DOB** field in a Name record is populated in the **Birth Date** field of the form.

If Mobile loses connection to the server, then temporary records can be added to allow completion of the form while offline. For more information, see "Working in Offline Mode" on page 45.

The process for adding Name and Vehicle record information to the form is the same. The examples given demonstrate adding a Name record to the Citation form.

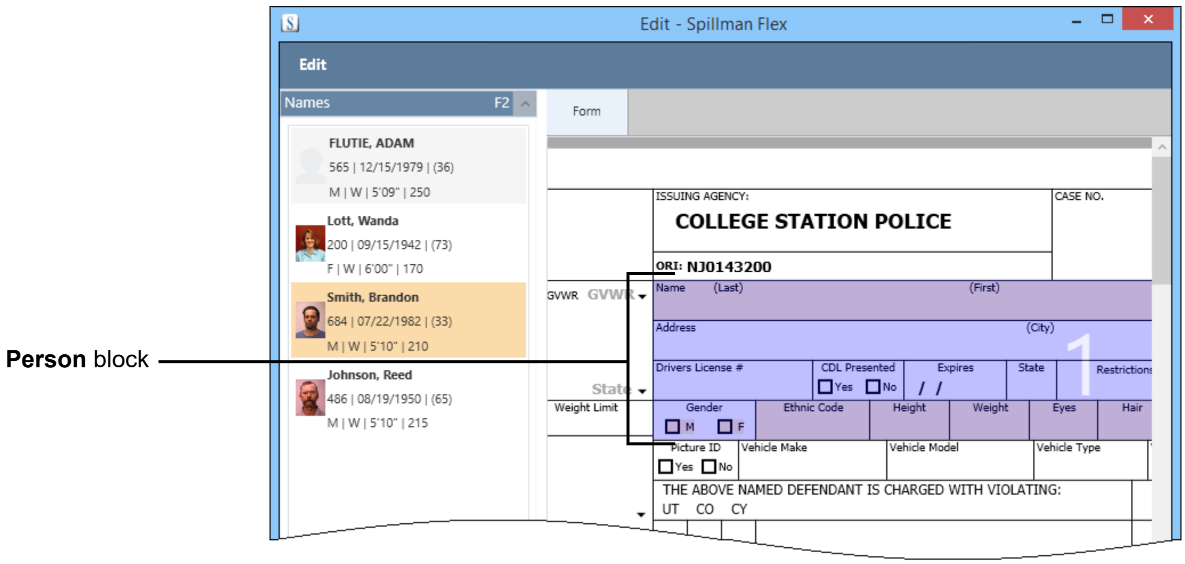
> **NOTE**
>
> If the data in the record did not transfer to the form, then a problem might exist with the translation table. For more information, see your SAA.

To add record information to the form:

1. With the form open, select the desired menu group. Press F2 for the **Names** menu group and F3 for the **Vehicles** menu group.
2. Select the desired record to highlight it, or use the Up or Down Arrow keys.

> **NOTE**
>
> If the desired record is not displayed, then click the **Search** button to find the record. See "Searching for a record" on page 25.

All fields related to the selected record are highlighted in the corresponding block on the form. For example, the **Person** block is highlighted.



3. Do one of the following:
   - Drag the record to the highlighted record block.
   - Press the number key for the number labeling the block. For example, if the **Person** block is labeled with a 1, then press the 1 number key.

   The record information is added to the form.

TIP

To collapse the **Search List** area, press F4. Press F2 (Names) or F3 (Vehicles) to reopen it.

Completing Additional Form Details

After adding Name and Vehicle record information to the form, additional details about the citation or crash must be added. Complete any necessary blank fields according to your state requirements.

TIP

Magnification tools are located in the lower-right corner of the form.
To adjust the magnification of the form, do one of the following:

– Click and drag the **Zoom** slider.
– Click the **Plus** or **Minus** icons.
– Click the **Fit Width** button to automatically adjust the form so it fills the horizontal screen space.
– Press Ctrl+Plus sign (+) to zoom in or Ctrl+Minus Sign (-) to zoom out.

If your state requires that attachments, such as a photo of the driver, be attached to the form, then the attachments can be added after the form is completed and the record is created.

Adding the violation location

The **Violation Location** area displays the address where the offense took place. If CAD call information is imported to the form, then the **Violation Location** area is populated. However, information can be manually entered or edited as needed.

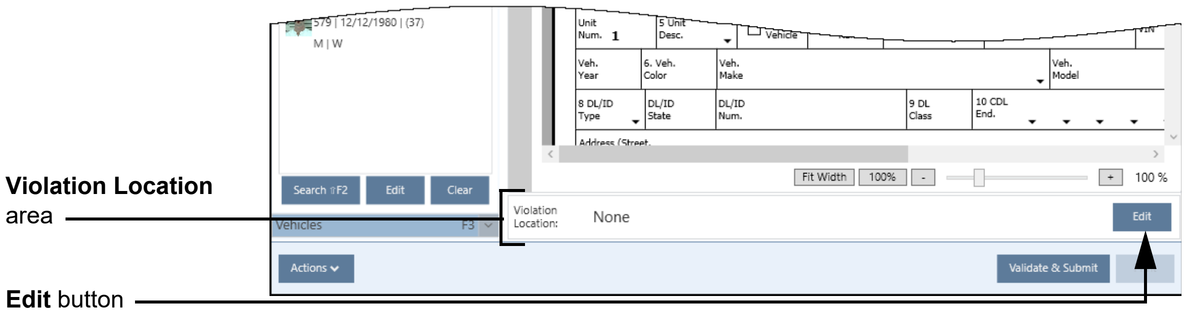
NOTE

The location must be updated in the **Violation Location** area only. If the location is updated directly on the form, the address will not be saved as part of the citation record.

If your agency maintains a geobase, and the violation location has been validated, then a marker ( ) is displayed next to the address.

To manually add the violation location:

1. With the form open, click the **Edit** button in the **Violation Location** area.



   The Address Selection window opens.

2. In the **Entered** field, enter the address.
3. Click **Search** or press Enter.

   The best matching address is displayed.

4. Do one of the following:
   - If the address is correct, then click **Select** or press Enter. The form is updated with the correct information.
   - If the address is incorrect, then click **Show More Results** to view similar addresses.

     Highlight the correct address, and then click **Select** or press Enter.
   - If none of the addresses are correct, then click **Don't Validate** to open the Additional Address Information window.

     Enter the city, state, and ZIP code for the address, and then click **Save**. The form is updated.

   The Address Selection window closes and the selected address is displayed in the **Violation Location** area.

Adding a crash diagram

For Crash forms, an image of the crash diagram can be added to the form using the third-party software Crash Designer. Crash Designer is built into the Flex software and enabled by your SAA. For more information, contact your SAA.

> **NOTE**
> For information about Crash Designer, refer to the Crash Designer user manual.

Using Crash Designer

To add a crash diagram to a Crash form using Crash Designer:

1. In the **Crash Diagram** box, click the **Click to Edit** link.

   The Crash Designer program opens.
2. Create your crash diagram.
3. Close the Crash Designer program.

   The Save Image dialog box opens, asking whether to save the current diagram image.
4. Click **Yes**.

   The image is added to **Crash Diagram** box in the form. To clear the image, click the **Delete** icon.

> **NOTE**
> If your image is not saved to your server and it is deleted from the **Crash Diagram** box in the form, then it must be recreated in the Crash Designer software.

Using other third-party software

To import a crash diagram made by third-party software other than Crash Designer:

1. In the **Crash Diagram** box, click the **Click to Import** link.

> **NOTE**
> If the **Click to Edit** link is displayed in the **Crash Diagram** box, then your SAA has not established the settings to import diagrams from software other than Crash Designer. See your SAA for further assistance.

   The File Explorer window opens to the default file location on your computer.

2. Navigate to the file location where crash diagrams are stored and select the desired diagram file.
3. Click **Open**.

   The image is added to the **Crash Diagram** box in the form. To clear the image, click the **Delete** icon.

Adding comments in Edit mode

For Citation forms, comments can be added to the form while in Edit mode or while in Review mode, according to agency requirements. For instructions on how to add comments in Review mode, see "Using the Comments tab" on page 40.

To add comments to a Citation form while in Edit mode:

1. Click the **Comments** tab.
2. Enter the comments to add to the form.
3. If all the required fields in the form are completed, then click **Submit**. See "Validating and Submitting the Form" on page 30. Otherwise, click the **Form** tab to finish completing the form.

Inserting additional pages

Additional pages can be added to the form, if necessary. The following process is the same for Crash and Citation forms.

NOTE

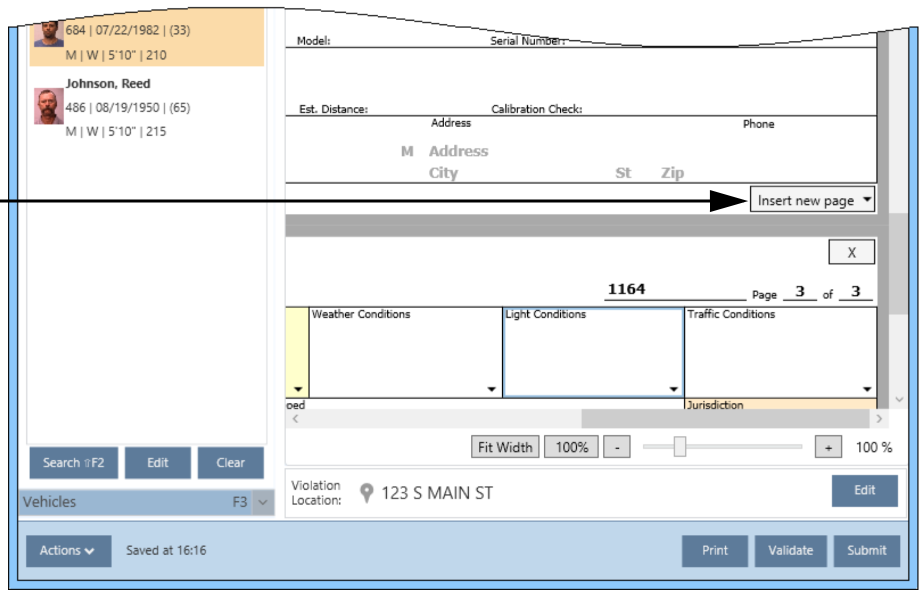
The ability to insert additional pages varies depending on your state.

To insert an additional page:

1. In the form, scroll to the bottom of the form page.

2. Click the **Insert new page** button.

Insert new page button



3. Select the type of page to insert. For example, **Additional Persons**.

   The additional page is added to the form below the current page, and the form's page numbers are updated.

> **NOTE**
>
> Once a page is added, the order of the pages cannot be changed.

Maintaining Records in the Form

Name and vehicle information is completed in the electronic form by placing record information from recent searches in **Person** or **Vehicle** blocks on the form. Records can be searched and edited from the form. Once a record is placed in the form, it can be removed and replaced with a different record.

To maintain records in the form, complete the following as needed:

- "Searching for a record" on page 25
- "Clearing recent searches" on page 27
- "Editing a record" on page 28
- "Removing and replacing a record" on page 29

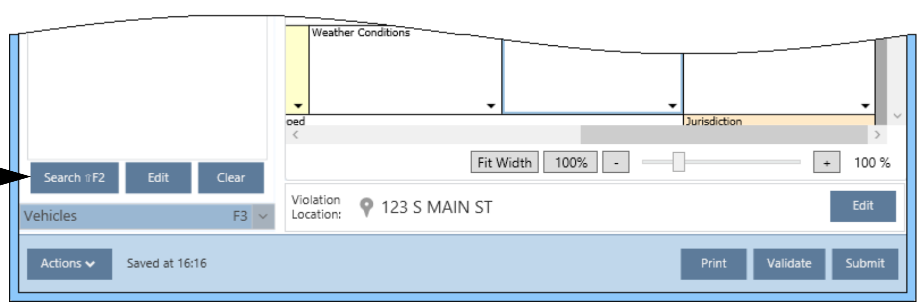
Searching for a record

The **Search List** area displays a list of Name and Vehicle records selected during recent searches in Mobile, with the most recent record at the top of the list. If the record is searched before the electronic form is opened, then the record is displayed at the top of the list. If the desired record is not displayed in the **Search List** area, then use the **Search** button to search for the record.

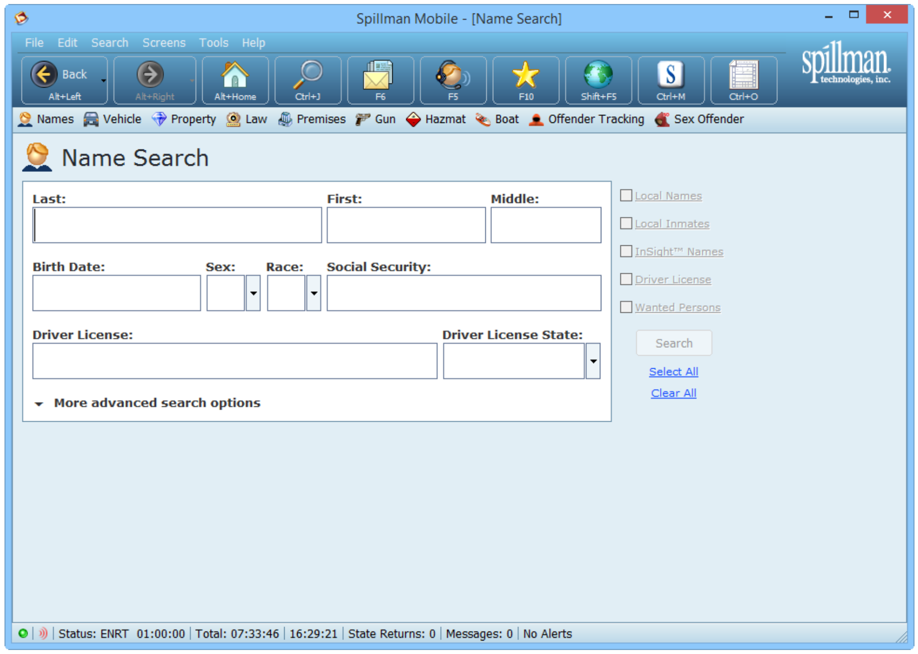
To search for a record from the form:

1. Select the appropriate menu to search.
2. Click the **Search** button, located at the bottom of the **Search List** area, or do one of the following:
   – To search Name records, press Shift+F2.
   – To search Vehicle records, press Shift+F3.

Search button



The search screen for the selected record type becomes active.



3. Enter your search criteria, and then click **Search** or press Enter. For more information, see the *Mobile User Manual*.

   All local records matching the search criteria are displayed.

> **NOTE**
>
> If no matches are found, then click the **Create New** link to add a new record. For more information, see the *Mobile User Manual*.

4. Do one of the following:

   – If the desired record is listed, then select the record using the Down Arrow key, and then press Enter, or double-click the record. Press Alt+Tab to return to the form.

     The selected record is displayed in the menu at the top of the **Search List** area.

   – If the desired record is not listed, then verify whether the record is in your **State Returns** folder. For more information, see the *Mobile User Manual*.

   – If the desired record is not in your local or StateLink search results, then add a new record. For more information, see the *Mobile User Manual*.

Clearing recent searches

Name and Vehicle records from recent searches are saved and listed in the **Search List** area. The number of records saved in the **Search List** area depends on the settings established by your SAA. All searched Name and Vehicle records are stored in the list until it is cleared, or the maximum number of stored records is reached. Clearing the list periodically makes it easier to find records.

NOTE

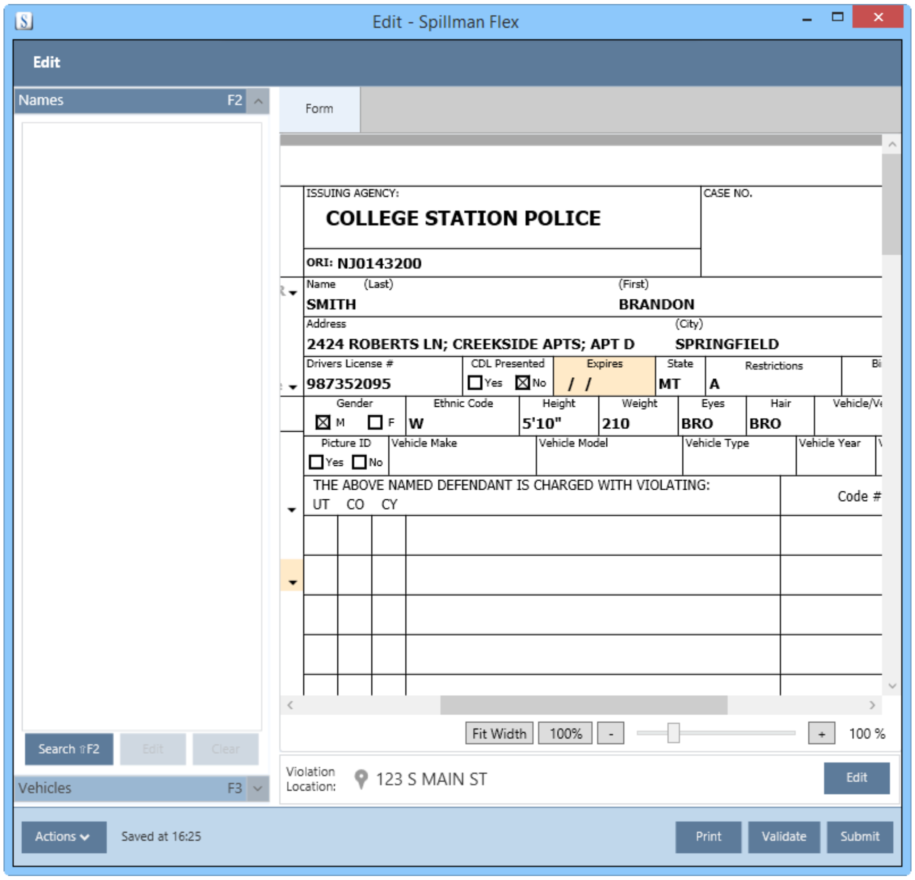
When records are cleared from the **Search List** area, they are only removed from the area and not deleted from the database.

To clear all recent search lists from Mobile, select **Search** > **Clear Forms Search List**.

To clear recent searches:

1. Select the menu to clear.
2. Do one of the following:
   - Press the Tab key until the **Clear** button is highlighted, and then press Enter.
   - Click the **Clear** button.

All records are removed from the selected menu.



Editing a record

If data is incorrect or missing from a Name or Vehicle record, then the record can be edited from the form, provided that the necessary privileges have been given. The Name or Vehicle record is updated in the database with any changes made.

To edit a record from the form:

1. Select the **Person** or **Vehicle** block to edit.
2. Do one of the following:
   - Press Enter.
   - Click the **Edit** button.

– Double-click the record block.

> **NOTE**
>
> To edit a record from the **Search List** area, select the record, and then click **Edit**, or double-click the record.

The Edit Record screen opens for the type of record selected.

3. Edit the data as needed. For field descriptions, see the *Mobile User Manual*.
4. When finished, click **Save**.

   The changes are saved, the Edit record screen is closed, and the form is updated.

Removing and replacing a record

To remove a record from the form and replace it with a different record, do one of the following:

- In the **Search List** area, select the desired record, and then drag it to the appropriate record block. The previous information is replaced with the new record information.
- Select the **Person** or **Vehicle** block with the incorrect record, and then click **Clear**. Select the desired record to replace the information, and then drag it to the appropriate record block.

Validating and Submitting the Form

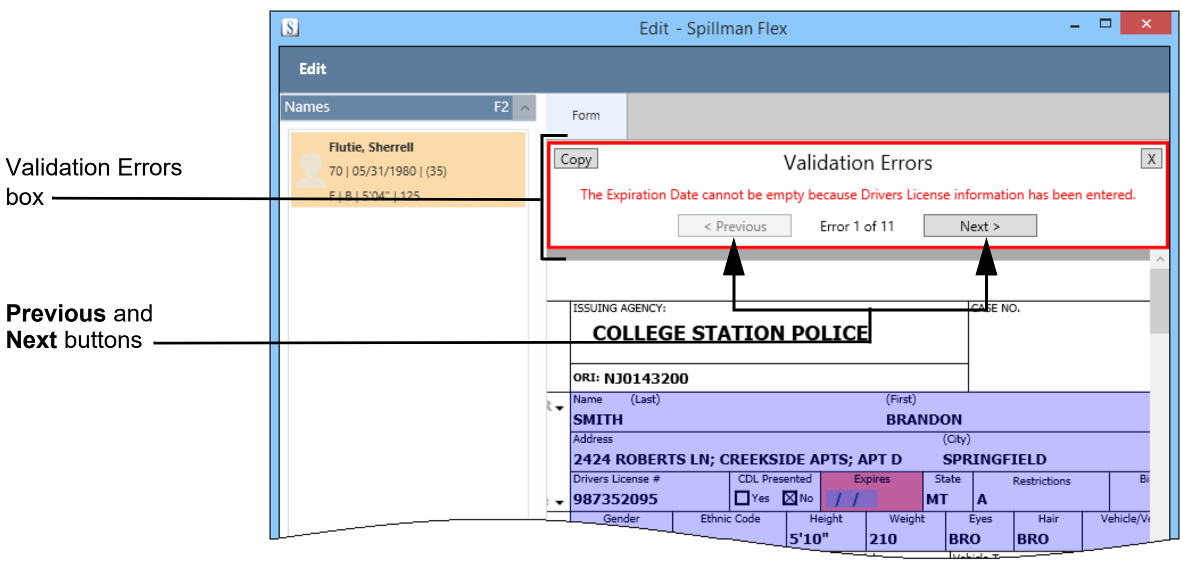
After all necessary information has been entered into the form, the form can be validated and submitted. Validation checks for common errors. However, depending on your state requirements, validation might not be required to submit and print the form. Additionally, states that require electronic submission might require additional validation prior to submission. For more information, contact your SAA.

To validate the form:

1. Click the **Validate** button.

> **NOTE**
>
> If your form does not have a **Validate** button, then validation occurs by clicking the **Submit** button. The remaining steps are the same.
>
> For agencies whose forms are sent to the state for validation, the state receives the submission through a broker server. If the server is not functioning properly, then an error occurs, validation fails, and the form cannot be submitted. If state validation fails, then see your SAA for assistance.

If there are fields that need to be corrected, then the Validation Errors box is displayed above the form with the number of errors found.



2. Use the **Previous** and **Next** buttons to review and correct each error listed in the Validation Errors box.

> **NOTE**
>
> If validation errors occur within records imported from the database, then a state translation code for the field value must be added for the error to be corrected. See your SAA for assistance in adding state translation codes.

3. Click **Submit**.

   One of the following occurs:

   – If validation is unsuccessful and unresolved errors are found, then the form is not submitted and the Validation Failed dialog box opens. Do one of the following:

     – To submit the form with the errors, click **Yes**.

     – To return to the form and correct the errors, click **No**. When finished, click **Submit**.

   – If validation is successful, then the form is submitted and the following occurs:

     – The form is displayed in Review mode. See “Using Review Mode” on page 37.

     – For Citation forms only, if your agency uses eSign for Android, then the form is sent to the eSign application. See “Collecting an Electronic Signature with eSign for Android” on page 32.

     – If your agency uses eSign for Windows, then the signature area is displayed on the form. See “Collecting an Electronic Signature with eSign for Windows” on page 38.

     – A Citation or Crash record is created.

     – If automated workflow has been set up by your SAA, then the Update Status dialog box opens. Complete workflow according to your agency’s requirements. If automated workflow has not been set up by your SAA, but your agency uses workflow, then the form enters workflow in the Message Center for approval. See the *Mobile User Manual*.

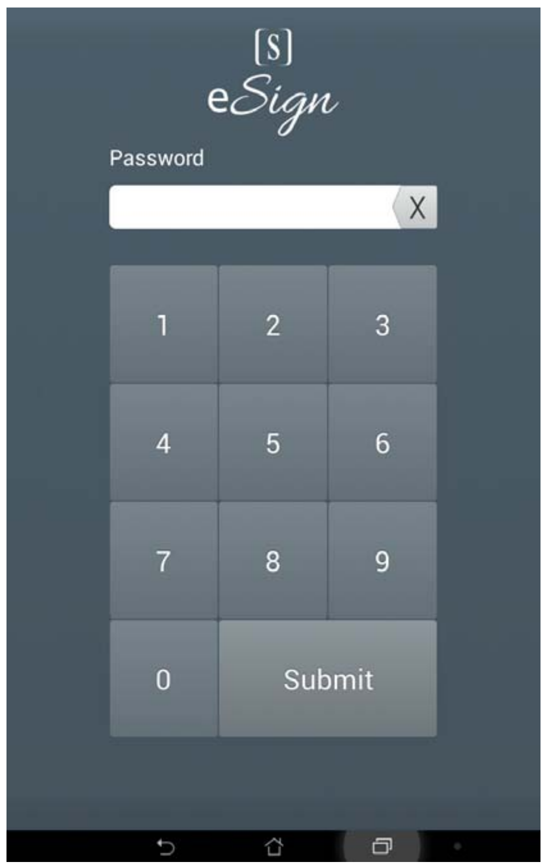
Collecting an Electronic Signature with eSign for Android

eSign is an application used to collect an offender's signature electronically, and is available for Android™ devices that communicate with Mobile using Bluetooth® wireless technology. Once the form is submitted in Mobile, a record is created in the database, and the form is sent to your Android device so a signature can be collected with eSign.

> **NOTE**
>
> Once the form is submitted and sent to eSign, it is placed in Review mode and cannot be edited.

To collect an electronic signature:

1. From your device, tap the **eSign** icon to open the application.

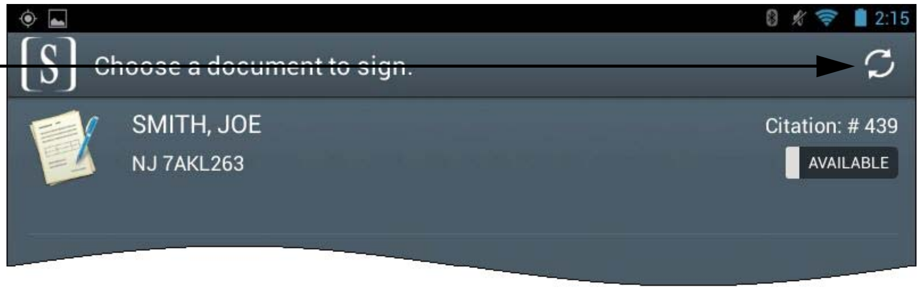


2. Enter your password, and then tap **Submit**.

> **NOTE**
>
> Your SAA sets the password for the entire agency.

All forms that were recently submitted are listed. If the desired form is not displayed, then tap the **Refresh** icon in the upper-right corner.

Refresh icon

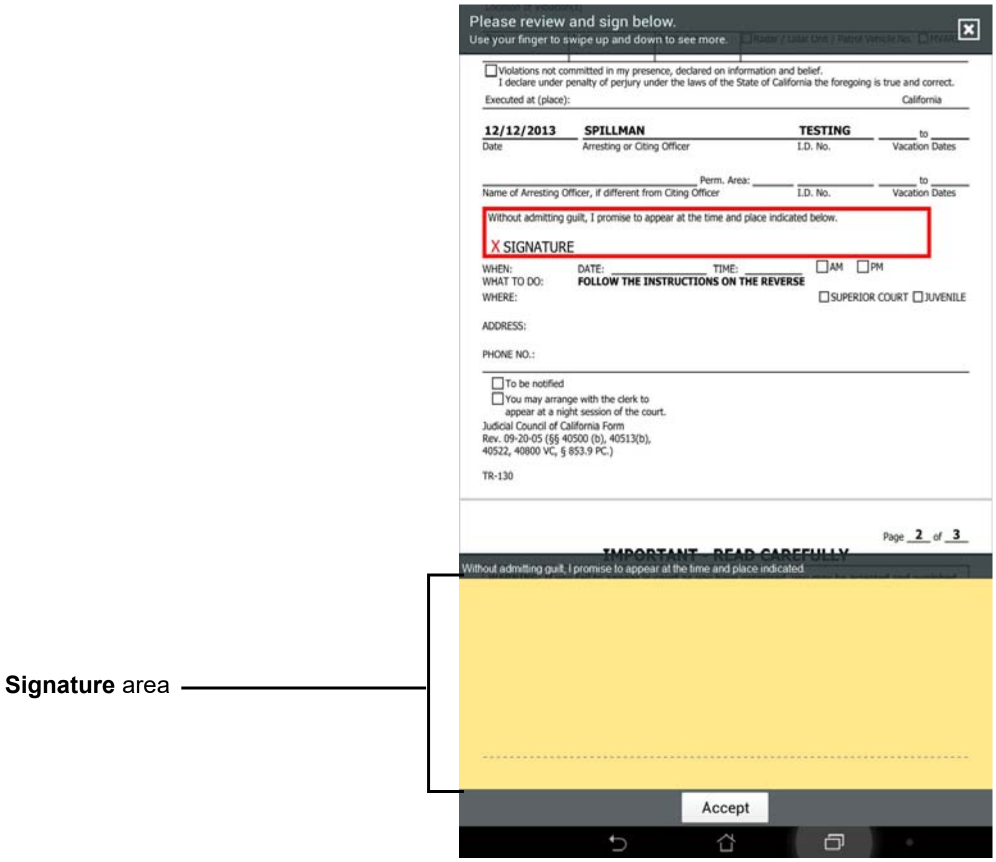


3. Tap the form that requires a signature.

   The form opens in eSign.

4. Instruct the offender to enter their signature in the yellow **Signature** area. If necessary, the offender can spread their fingers to zoom out

and pinch to zoom in. The offender can also drag to view specific areas or swipe to go to the bottom of the screen.



> **NOTE**
>
> If the offender refuses to sign, then tap **Accept**. The signature area remains blank, and the signature can be indicated as refused at a later step.

5. Instruct the offender to tap **Accept** when finished.

The eSign application is locked, and the following screen is displayed.

Key icon

6. Once the offender returns the device, tap the **Key** icon, and then enter your password.

   The form, including the offender's signature, is displayed.

7. Do one of the following:

   – If the signature is valid, then tap **Approved** to continue with the citation. The citation, including the signature, is uploaded to Mobile.

> **NOTE**
>
> The citation form cannot be edited while the signature is uploading to Mobile.

   – If the signature is not valid, then tap **Re-Sign** to have the offender try again. The screen returns to the citation form for the offender to sign. If there is an error in the form that needs to be corrected, then tap **Cancel**. The screen returns to the list of forms. Return to

the form in Mobile, make any necessary corrections, and resubmit the form. A corrected copy of the form is sent to eSign. Repeat steps 1–7.

- If the offender refused to sign the citation form, then tap **Refused**. The citation is uploaded to Mobile with no signature and a note explaining that the signature was refused.

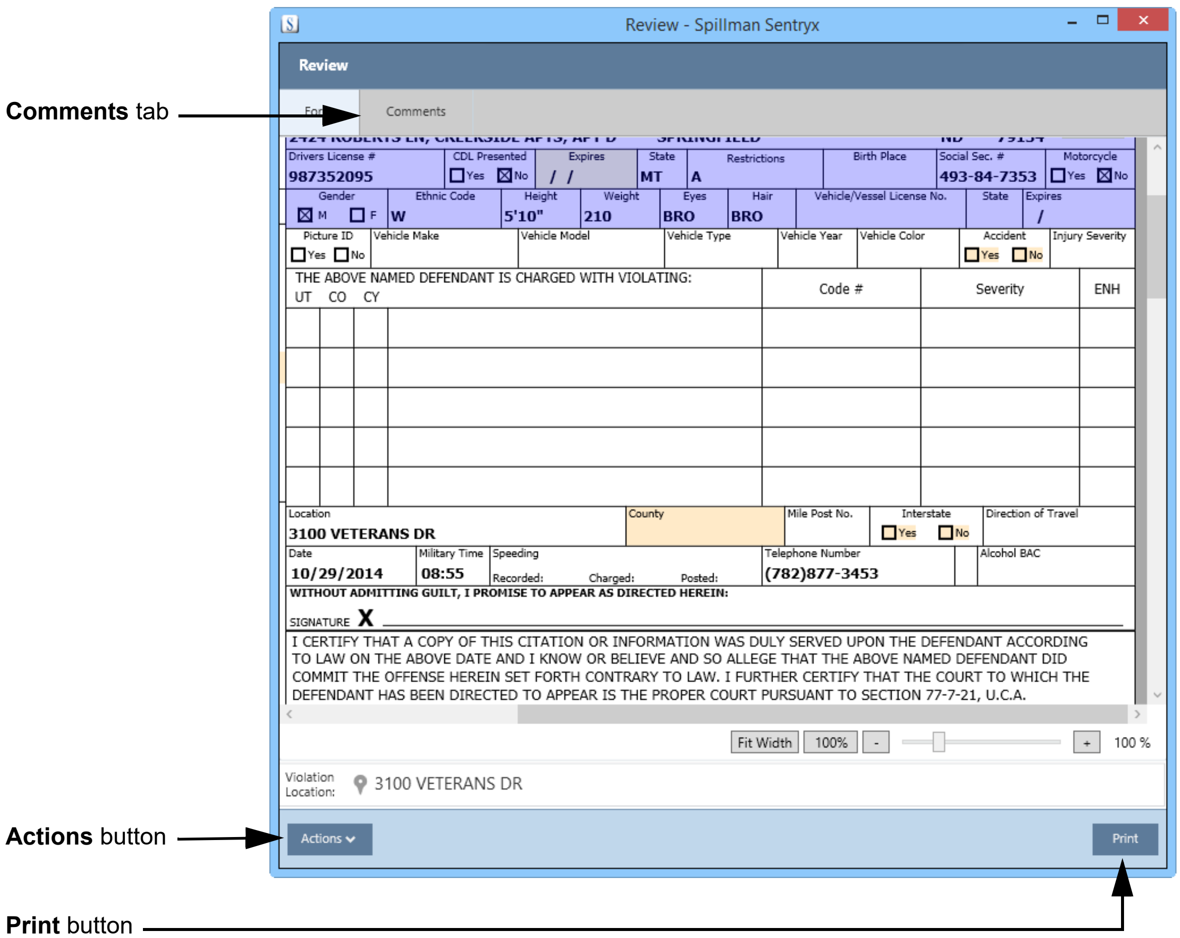
Once the form is uploaded to Mobile, a message is displayed indicating the upload was successful.

NOTE

eSign does not work in Offline mode. If connection to the server is lost during the citation process, then the eSign application fails to find a citation or upload a signature.

Using Review Mode

After the form is submitted, the screen changes to Review mode.



Depending on the form selected and the requirements of your state, the following options are available:

- **eSign for Windows**: For Citation forms only, depending on the settings for your agency, the **Signature** area can be signed when the form enters Review mode. See “Collecting an Electronic Signature with eSign for Windows” on page 38.
- **Comments tab**: For Citation forms only, use the **Comments** tab to add comments while in Review mode. See “Using the Comments tab” on page 40.
- **Actions button**: The options available in the **Actions** button depend on the form selected and the requirements of your state:

- **Edit**: For both Crash and Citation forms, use the **Edit** option to return to Edit mode. See "Using the Edit option" on page 41.
- **Print Officer Copy**: For Citation forms only, use the **Print Officer Copy** option to print an officer copy of a citation. See "Using the Print Officer Copy option" on page 41.
- **Supplement**: For Crash forms only, use the **Supplement** option to create a crash form supplement. See "Using the Supplement option" on page 41.

NOTE

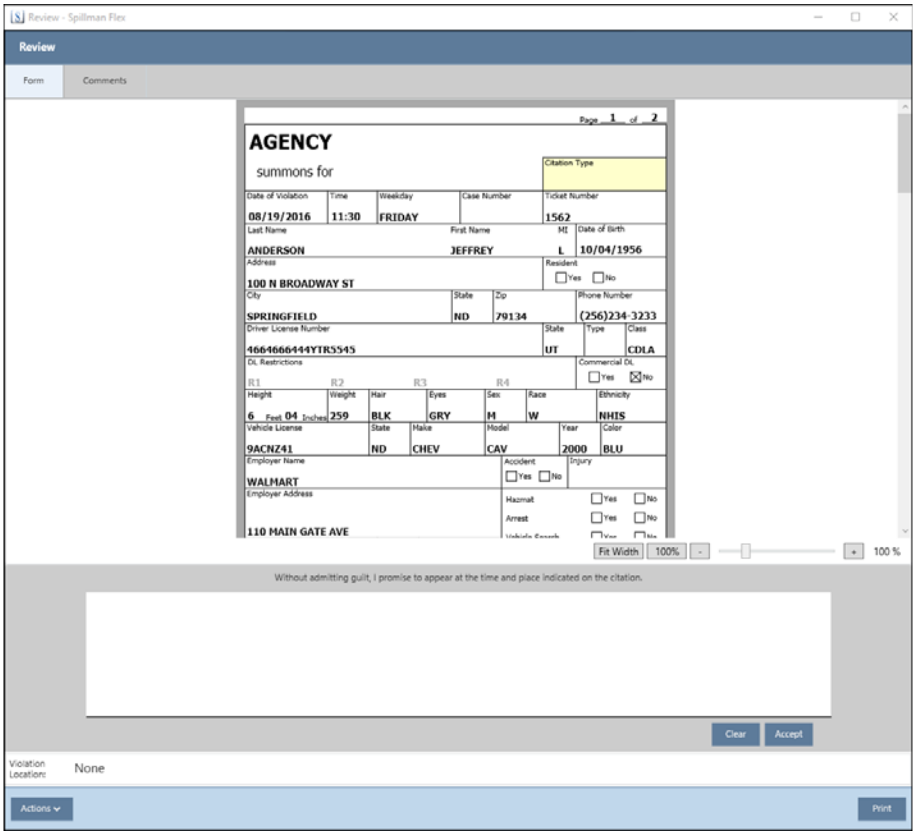
The options described for the **Actions** button are available to all states, in general. If your state has specific Review mode requirements that are not described here, then see your SAA for further assistance.

- **Print button**: For both Crash and Citation forms, use the **Print** button to print a completed from. See "Using the Print button" on page 42.

Collecting an Electronic Signature with eSign for Windows

The eSign for Windows feature allows officers to collect a signature from an offender using any Windows device. If the feature is enabled, then the area to sign is integrated into the form.

After a Citation form has been completed, validated, and submitted, the form enters Review mode and the **Signature** area is displayed.



To collect an electronic signature using eSign for Windows:

1. Instruct the offender to sign in the **Signature** area. Devices that are not touch-enabled can be signed using a computer mouse.

> **NOTE**
>
> If the Citation form is modified after it is signed, then a new signature must be collected. If the connection to the server is lost while the citation is being completed, then the changes are saved and can be submitted when the connection is reestablished. For more information, see “Working in Offline Mode” on page 45.

2. If the signature is not valid, then click **Clear** to clear the **Signature** area and have the offender try again.
3. When finished, click **Accept**.

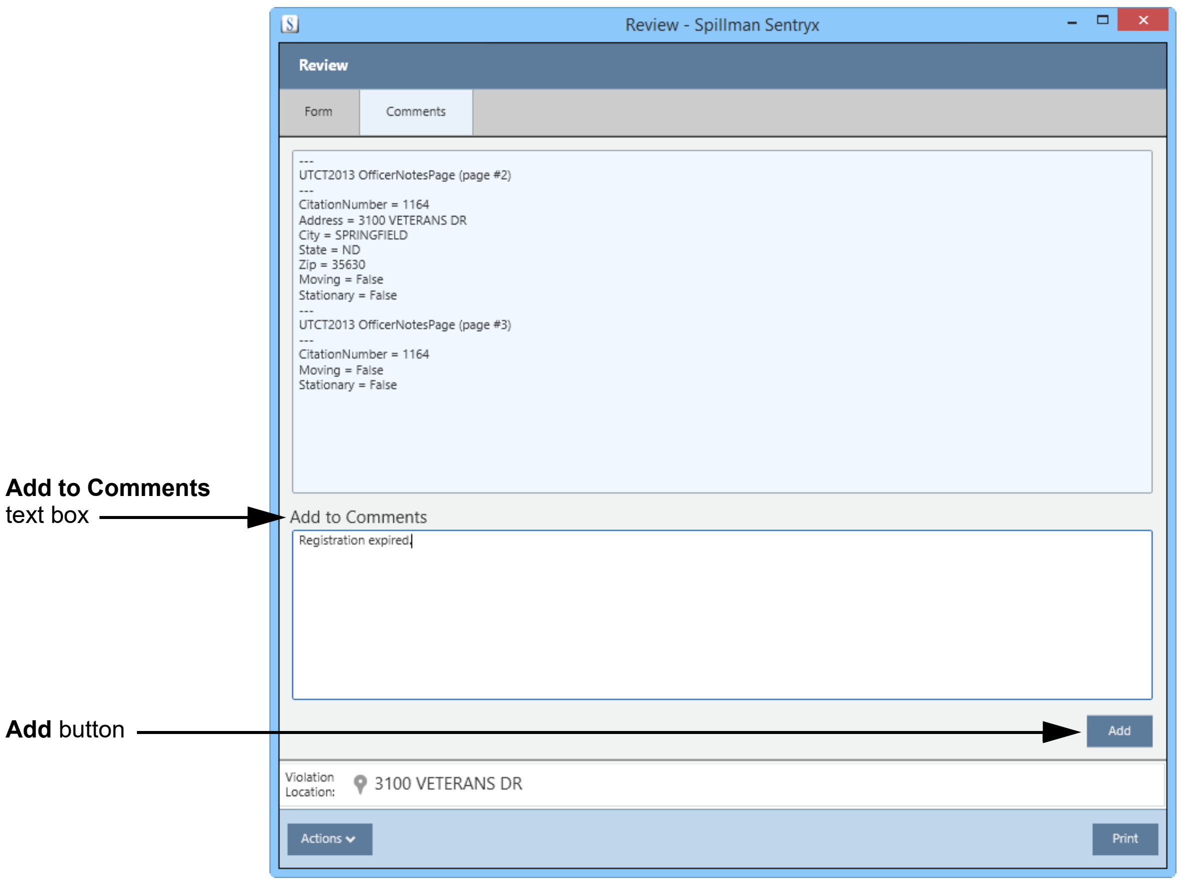
   A confirmation message is displayed, stating that the signature was successfully uploaded.

4. Click anywhere on the form to close the message and return to the form.
5. Print the form. See "Using the Print button" on page 42.

Using the Comments tab

To add comments to a Citation form in Review mode:

1. Click the **Comments** tab.



2. In the **Add to Comments** text box, enter the comments.
3. Click **Add**.

   The comments are added to the form and stamped with the time, date, and author.

Using the Actions button

Depending on the form selected and your state requirements, with the **Actions** button, do any of the following:

- "Using the Edit option" on page 41
- "Using the Print Officer Copy option" on page 41
- "Using the Supplement option" on page 41

NOTE

The options described for the **Actions** button are available to all states, in general. If your state has specific Review mode requirements that are not described here, see your SAA for further assistance.

Using the Edit option

Depending on your privileges and the requirements for your state, a form can be edited after it is submitted.

To return to Edit mode from Review mode, click the **Actions** button, and then select **Edit**. If your state does not allow editing forms after submission, then this option is not available in your form.

Using the Print Officer Copy option

When printing an officer copy of the Citation form, any comments made by an officer are included. Therefore, it is recommended to print the officer copy after printing the citation, serving it to the offender, and adding comments.

For more information on printing the citation, see "Using the Print button" on page 42. For more information on adding comments after a form has been submitted, see "Using the Comments tab" on page 40.

To print an officer copy of a Citation form in Review mode:

1. Click the **Actions** button, and then select **Print Officer Copy**.

   The Print dialog box opens.

2. Configure your printer settings, and then click **Print**.

   The officer copy is printed.

Using the Supplement option

For Crash forms, a supplement can be created so additional information about the crash can be added without modifying the original. Once submitted, the supplement is saved as an attachment to the original Crash record.

To create a Crash supplement in Review mode:

1. Click the **Actions** button, and then select **Supplement**.

   A copy of the Crash form is created and opened in Edit mode.

2. Add the additional information to the form as needed. See "Completing Additional Form Details" on page 20.

3. Validate and submit the Crash supplement. See "Validating and Submitting the Form" on page 30.

4. If desired, print the Crash supplement. See "Using the Print button" on page 42.

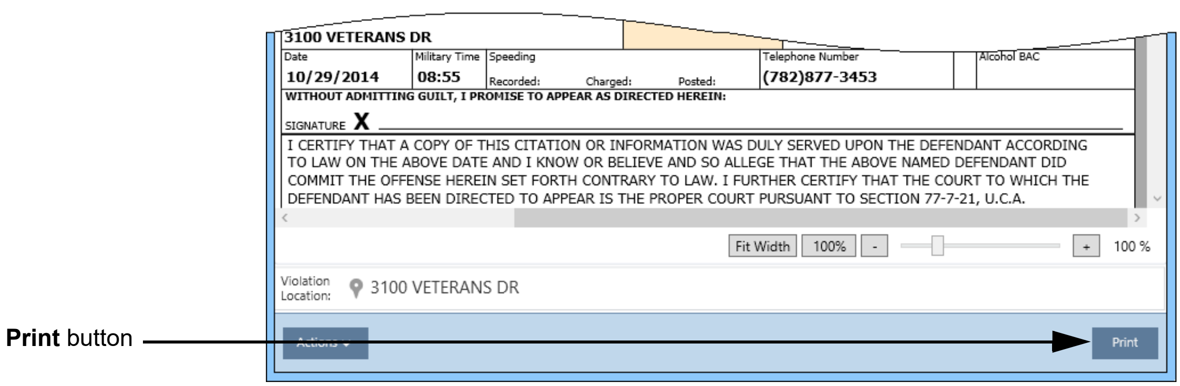
Using the Print button

Once the form has been completed, validated, the electronic signature collected (where required), and submitted, the form can be printed.

> **NOTE**
>
> For agencies that use state validation, validation must be completed before printing the form in Review mode.

To print the form in Review mode:

1. Click **Print**.



   The Print dialog box opens.

2. Configure your printer settings, and then click **Print**.

   Depending on your agency's settings, the Print Verification prompt box opens, asking if the form printed successfully.

3. If the form printed successfully, click **Yes**. Otherwise, click **No** to try printing again.

> **NOTE**
>
> The following printers have been tested and can be used with the following printer preferences:
>
> – For Zebra RW420 printers, set the Width between 4.10” and 4.25” and set the Height to 11”.
>
> – For Brother RJ-4030 printers, set the Width to 4.10”, the Length to 11”, and the feed to 0.12”.
>
> If your agency uses a different printer, then use the above recommendations as a guideline for configuring your printer settings.

Retrieving Draft Forms

Once a form is opened and changes are made, a draft is saved locally in the **Draft Forms** folder of the Message Center. By default, drafts are saved every 30 seconds. If the form cannot be completed at the time of the incident, then it can be retrieved from the **Draft Forms** folder and finished later.

An electronic form is not sent to the database until the form is submitted. Closing the form saves the form locally as a draft. The draft is saved to the server when Mobile is exited.

To retrieve a draft form:

1. In Mobile, click the **Message Center** icon, or select **Screens > Message Center**.
2. In the **Messages** pane, select the **Draft Forms** folder.

   All draft forms are displayed with one of the following icons:

   – A red void icon next to the draft indicates that the draft is saved locally and can only be accessed from the computer on which it was drafted.

   – A green check mark icon next to the draft indicates that the draft is saved on the server and can be accessed from any computer.
3. Select the desired form to open, and then click the **Open Form** link.

   The selected form opens in Edit mode.
4. If necessary, make any changes, and then do one of the following:

   – To save your changes and submit the completed form, go through the validation and submission process. See “Validating and Submitting the Form” on page 30.

   – To save your changes and submit the form at another time, close the form.

NOTE

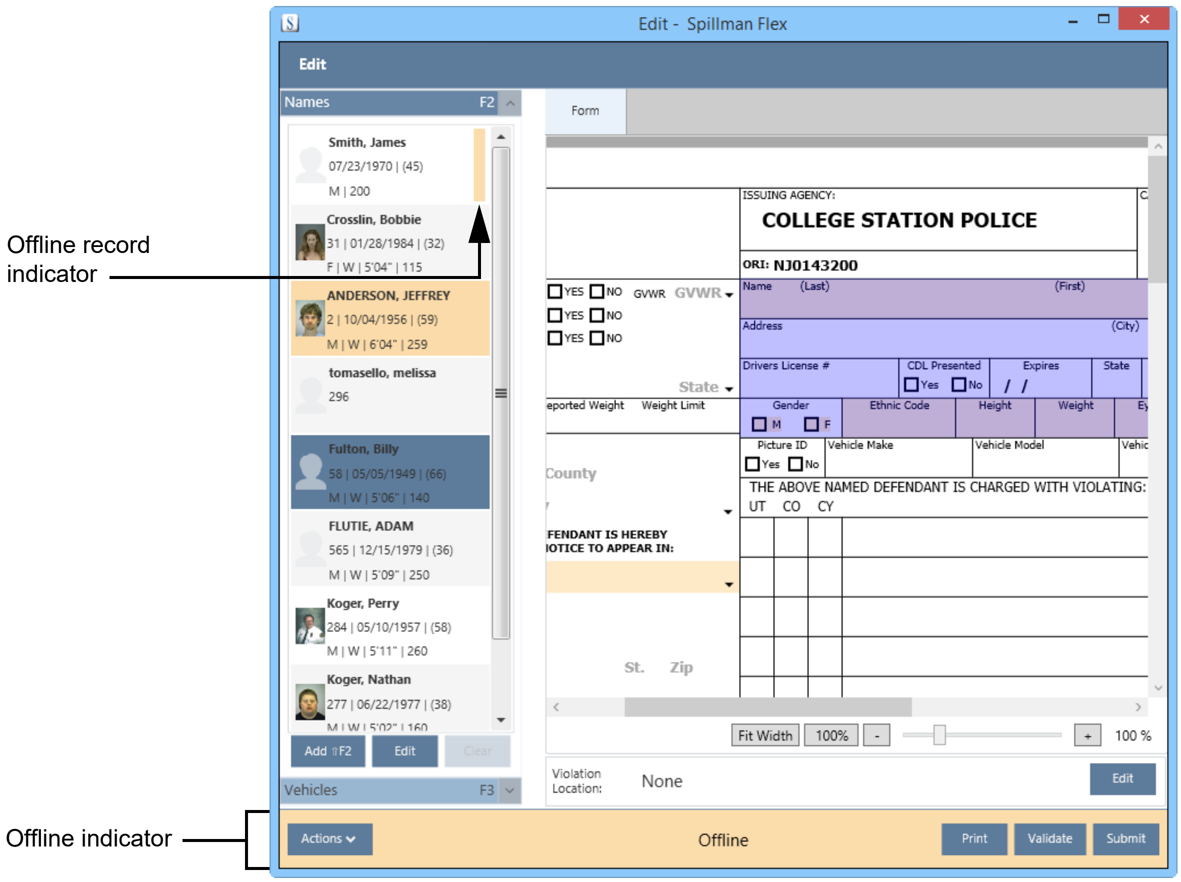
Drafts should be completed and submitted to the database in a timely manner to avoid inaccurate reporting.

Working in Offline Mode

If connection to the server is lost while adding Name, Vehicle, or Property records, or while completing the form, a draft of the records is automatically saved, which can be later submitted. When connection to the server is reestablished, the software prompts to submit the draft.

Entering data while offline

When Mobile is offline, screen functionality continues, such as adding records, updating information, and completing the form. However, the form visually changes to notify when Offline mode is in use.



The following occurs to indicate Offline mode:

- The bottom of the screen turns orange and displays the message `Offline`.

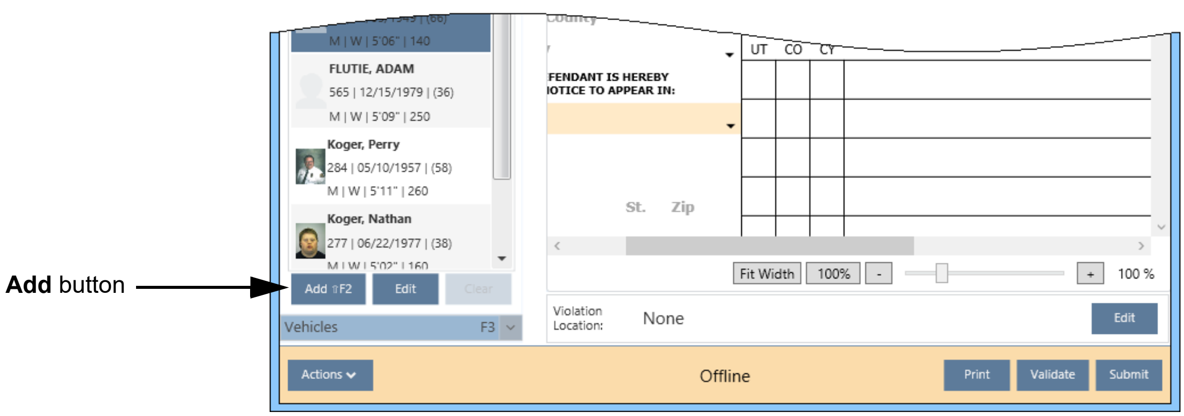
- Any records added to the database while in Offline mode display an orange stripe, indicating that they need to be submitted once connection to the server is reestablished.

Creating records while offline

Although the database cannot be searched while offline, a temporary new record can be created to complete the form. When server connection is reestablished, temporary records must be permanently added to the database. At that time, the software performs an advanced search to ensure duplicate data is not being entered. For more information, see "Submitting temporary records" on page 48.

To create a record while offline:

1. Do one of the following:
   - From within the form, do one of the following:
     - To add a Name record, press Shift+F2.
     - To add a Vehicle record, press Shift+F3.
     - In the **Search List** area, click the **Add** button.



   - From the Mobile Search Results screen, click the **Create New** button or link.

   The Add Record screen opens for the record type.

2. Complete the fields. For field descriptions, see the *Mobile User Manual*.

> **NOTE**
>
> Only certain fields are available when working in Offline mode. Therefore, not all of the tabs on the Edit Record screen can be accessed.

3. When finished, click **Save**.

   A message is displayed stating that the record is saved to your device and needs to be submitted once connection is reestablished.

4. To close the message, click **OK**.

   Records added while in Offline mode are indicated in the **Search List** area by an orange stripe, and are available for use to complete the form. However, they must be added to the database once online again. For more information, see "Submitting temporary records" on page 48.

> **NOTE**
>
> A temporary record can be added by scanning a driver license. When a driver license is scanned, the Add Name Record screen opens and the information from the license is imported. Verify the information imported correctly, enter any additional information, and then click **Save**.

Modifying a record while offline

If errors or out-of-date information is found in a record, then the record can be modified while offline.

To modify a record while offline:

1. Do one of the following:
   - With the form open, click the **Edit** button in the **Search List** area or in the highlighted block on the form.
   - With the record open in Mobile, click the **Edit** button.

   The Edit Record screen opens for the record type.

2. Edit the information as necessary.

> **NOTE**
>
> Only certain fields are available when working in Offline mode. Therefore, not all of the tabs on the Add Record screen can be accessed.

3. When finished, click **Save**.

   A message is displayed stating that the record is saved to your device and needs to be submitted once connection is reestablished.

4. To close the message, click **OK**.

   Records modified while in Offline mode are indicated in the **Search List** area by an orange stripe, and are available for use to complete the form. However, they must be added to the database once connection to the server is reestablished. For more information, see "Submitting temporary records" on page 48.

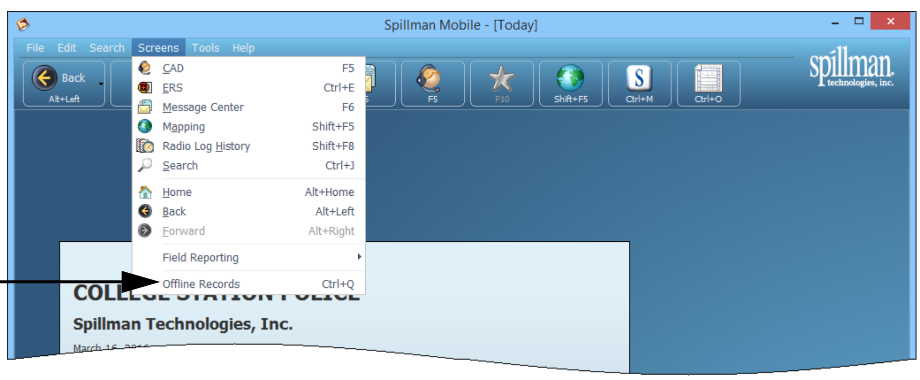
Submitting temporary records

Although temporary records can be added or edited while in Offline mode, they are not permanently added to the database until connection to the server is reestablished and they are submitted. The form cannot be submitted until the temporary records are added to the database. When the temporary records are added, an advanced search is performed to check for duplicate records and to validate the addresses.

To submit temporary records:

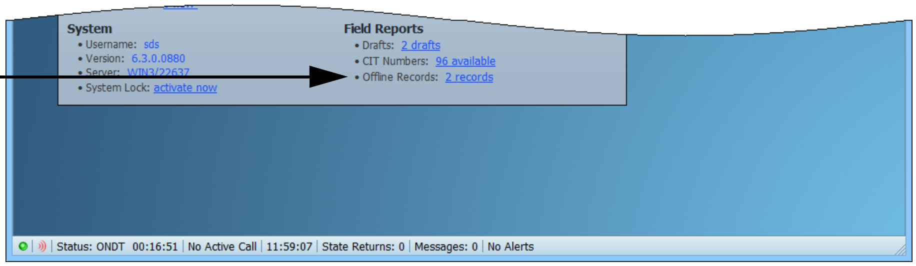
1. Do one of the following:
   – From the menu bar, select **Screens** > **Offline Records**, or press Ctrl+Q.

Offline Records option



– From the Mobile Today screen, click the **Offline Records** link.

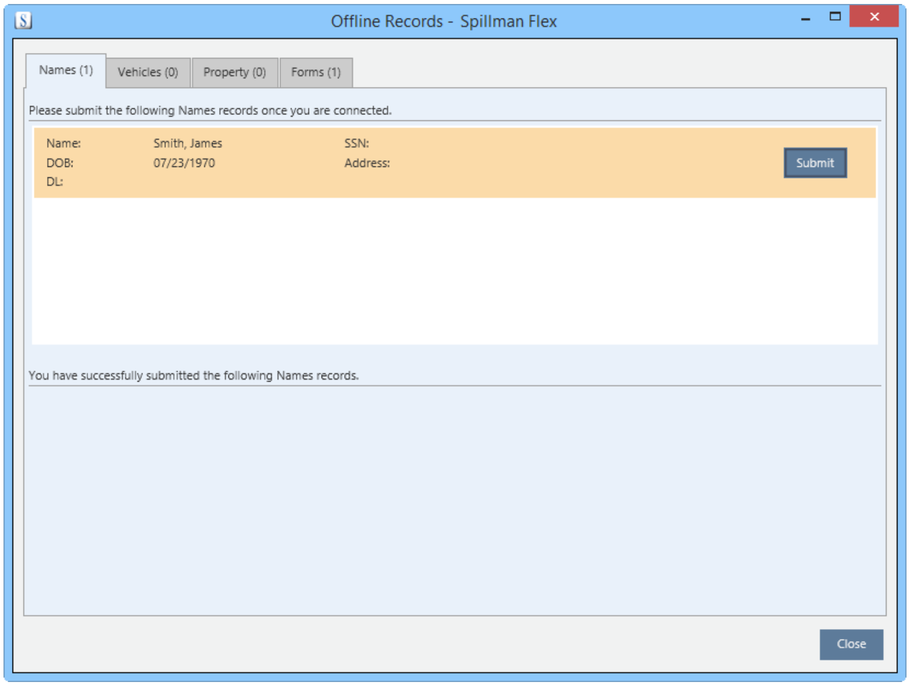
Offline Records
link



NOTE

The **Offline Records** option and **Offline Records** link are displayed only if there are temporary records to submit.

The Offline Records screen opens.



The screen contains the following tabs: **Names**, **Vehicles**, **Property**, and **Forms**.

By default, the **Names** tab is displayed when the Offline Records screen opens, and contains a list of all the temporary Name records that were added while in Offline mode. All Name records must be submitted before records from the other tabs can be submitted.

2. With the Name record highlighted, click **Submit**, or press Enter.

   If your agency maintains a geobase, then the Address Selection window opens.

3. Highlight the correct address, and then click **Select**.

   An advanced search is performed to check for duplicate records. One of the following occurs:

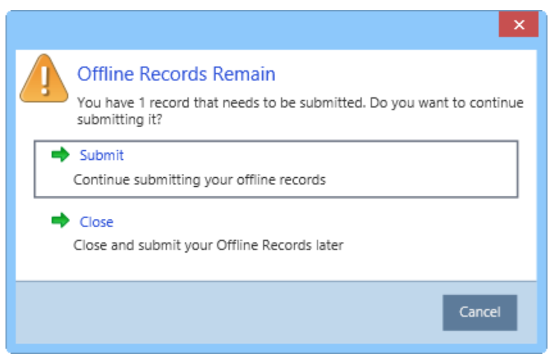
   – If a potential duplicate is found, then the Name Validation window opens. For more information on validating records, see the *Mobile User Manual*.

   – If no potential duplicate is found, then the temporary record is saved and displayed in the **You have successfully submitted the following Names records** area.

4. Repeat steps 2–3 for each record in the **Names** tab.

5. When finished, select the **Vehicles**, **Property**, or **Forms** tabs to continue submitting temporary records. Repeat steps 2–4 for each record and tab.

   If your Mobile session is closed before submitting all temporary records, then the Offline Records Remain dialog box opens.



6. To submit your offline records, click **Submit**. Otherwise, click **Close** or **Cancel**.

   Your offline records are submitted and saved to the database.

NOTE

The form cannot be submitted until all temporary records have been saved to the database.

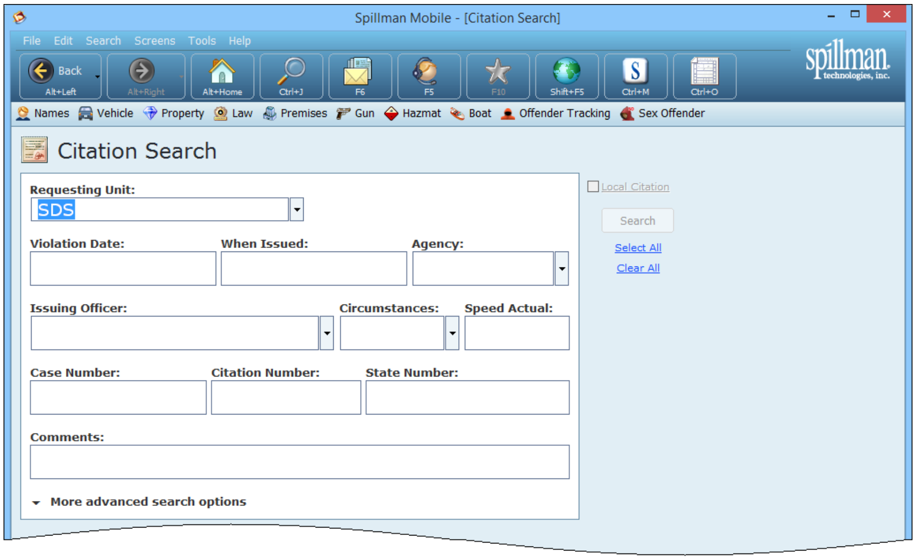
Viewing the Record for the Form

After a form is submitted, the record for the form can be managed in Mobile.

To view the record for the form:

1. From the menu bar, do one of the following:
   - To view a Crash form record, select **Search** > **Other Local Searches** > **Accident**.
   - To view a Citation form record, select **Search** > **Other Local Searches** > **Citation**.

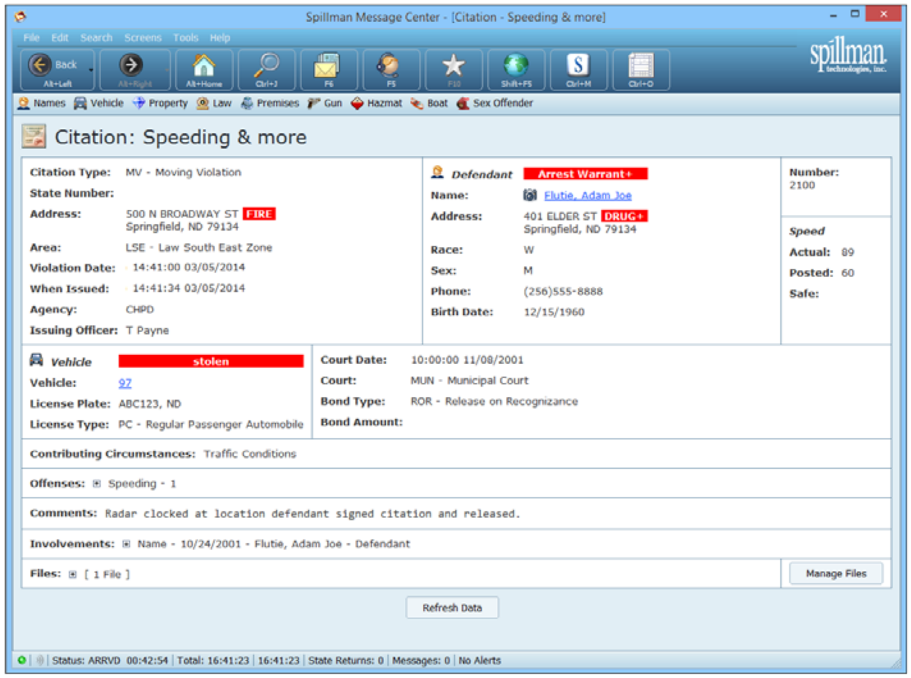
   The Search screen opens.



2. Enter the search criteria, and then click **Search** or press Enter.

   All records that match the search criteria are displayed.
3. Double-click the desired record.

The record opens.



The record displays the violation location, the violator or person involved, the vehicle, the offense, any involvements related to the record, and any files attached to the record, including a link to the form. For more information on using records, see the *Mobile User Manual*.

With the record open, the following options are available:

– To display all offenses, involvements, approval history, name, vehicle, or other information related to the record, click the plus sign next to the row for the desired information type. The information available depends on the record type being viewed.

– To open the form in Review mode, in the **Files** area, click the plus sign, and then double-click the **.afr** link.

– To update the approval status for the form, click the **Approval** button.

Chapter 2

Administrator Information

Jump to topic:

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Introduction

To use the electronic forms for State eCitation (Citation) and State Crash (Crash), and to grant users privileges, the following tasks must be completed:

- “Setting Up Application Parameters” on page 59
- “Setting Up Module Settings and System Privileges” on page 61
- “Setting Up Workflow for Submitting Forms Electronically” on page 64
- “Modifying the Auto-Save Default Settings” on page 67
- “Changing the Form Names” on page 68
- “Setting Up eSign for Android” on page 69
- “Setting Up eSign for Windows” on page 73

> **NOTE**
> The ability to create Citation and Crash forms is available only to select states. Contact your Spillman Client Services representative for more information.

In addition to completing the tasks described in this chapter, see the *Mobile Administration Manual* for the following tasks:

- **Set up the translation codes for your agency.** Use the Translation Administration Tool to translate code values from state returns to table values used in database records, and from database records to values the state uses in its forms.
- **Set up Offline mode.** By default, Offline mode is enabled so that a Crash or Citation form can be created without a connection to a server. This setting can be modified in the `options.xml` file.

Setting Up Application Parameters

To use Citation and Crash forms, the following application parameter must be set up in the Application Parameters table (`apparam`). For information on working with application parameters, see the *Application Setup and Maintenance Manual*.

Parameter	Description	Value
`aftables`	`Attach Files Tables` Determines which tables allow file attachments. To attach files, such as images or the generated form to the Citation or Accident record, the related table must be included in the list of tables in the **Application Parameter Value** field that allow file attachments. In the text editor, add each value as a new line of text.	`ctmain number` `acmain number`

Setting Up Code Tables

If your agency wants the officer's ID to populate in the **Officer's ID No.** fields of the forms, then the following code values must be added to the Official Names Codes table (`apnames`) and the Miscellaneous Info Type table (`tbmitype`). If the code values are left empty, then, for the Crash form, the value in the **abbr** field of the Official Names Codes table is used, and for the Citation form, the field is left blank.

Code Name	Description	Table Name
`crsoid`	Populates the officer's ID in the Crash form.	`apnames` `tbmitype`
`ctsoid`	Populates the officer's ID in the Citation form.	`apnames` `tbmitype`

Setting Up Module Settings and System Privileges

To use the Citation and Crash forms, module settings and system privileges need to be set up in the Administration Manager (`adminutil`).

It is recommended to give users privileges to add and modify Name, Vehicle, and Property records.

> **NOTE**
>
> If the user or group already has Add or Modify privileges for records in the database, then the user or group also has Add or Modify privileges in Mobile.

If your agency uses the File Capture module, then some users or groups might need privileges to view, add, or delete files.

For more information on module settings, see the *Application Setup and Maintenance Manual*. For more information on how to set up system privileges, see the *Security Setup and Maintenance Manual*.

Module settings The following module settings need to be set up in the **Module.FR** folder.

Setting	Description	Value
`AllowDefaults`	Determines whether a user can set default values for a form to open each time a new form is opened. • Set to **`True`** to enable the **Save as Default** and **Clear Form** actions in Edit mode. • Set to **`False`** to disable the **Save as Default** and **Clear Form** actions in Edit Mode.	`True/False`
`AllowPartialData`	Determines whether name and vehicle information can be added to a form without searching for or creating a new Name or Vehicle record. • Set to **`True`** to allow name and vehicle information to be added directly to a form without searching for or creating a new Name or Vehicle record. To use this feature, hold the Shift key and then click in the desired field. If a Name or Vehicle record is placed in the field at a later time, then the original information is replaced with the information from the record, and the field cannot be edited directly in the form. Name and Vehicle record information entered directly into the form is only saved on the form and does not update to Flex. • Set to **`False`** to require that **Name** and **Vehicle** fields on the form be completed only with Name or Vehicle record information from the database. The default value is `False`.	`True/False`
`AttachPDFReport`	Determines whether a copy of the Crash or Citation form is saved as an attachment to the record when the form is submitted. • Set to **`True`** to save a PDF copy of the Crash or Citation form as an attachment to the record. • Set to **`False`** to not save a PDF copy of the Crash or Citation form as an attachment to the record. The default value is `False`.	`True/False`
`DraftRetentionDays`	Determines the number of days a draft remains in the **Drafts** folder of the Mobile Message Center before it is deleted. Enter a value for the number of days a draft can be kept in the **Drafts** folder. The default value is `-1`, meaning drafts are never deleted. **NOTE**: Modifying this setting affects all drafts in the **Drafts** folder.	Numeric

Setting	Description	Value
`SaveRequiresValidForm`	Determines whether the Crash or Citation form requires successful validation before data can be saved. • Set to **`True`** to require forms to pass validation before being saved. • Set to **`False`** to not require forms to pass validation before being saved. The default value is `False`.	`True/False`
`UseBuiltInCrashDiagram`	Determines how a crash diagram is entered into a Crash form. • Set to **`True`** to use the Crash Designer third-party software to create a crash diagram. • Set to **`False`** to import crash diagram image files from other third-party software to the Crash form.	`True/False`
`UseIncidentNumberAsCrashID`	Determines whether Incident Numbers are used as the identification numbers for Crash records, and if an identification number is required. • Set to **`True`** to use the Crash record number as the Accident record number. NOTE: If `synxtid` is setup for the Accident table, then this value overrides. • Set to **`False`** to not use Incident Numbers as the identification numbers for Crash records, and to not make an identification number required. The default value is `False`. **NOTE**: The name of the field that contains the identification number varies according to your state.	`True/False`

System privileges The following privileges need to be set up for Citation and Crash forms.

System privilege	Description	Value
`mdcmdlFRCite`	Allows users to access and use the Citation form. Modify privileges are required to edit a form that was previously submitted.	Access, Modify
`mdcmdlFRCrash`	Allows users to access and use the Crash form. Modify privileges are required to edit a form that was previously submitted.	Access, Modify

Setting Up Workflow for Submitting Forms Electronically

Depending on the requirements for your state, Crash and Citation forms can be submitted to the state electronically.

Use the following as a guide to set up workflow for electronic submission of state forms. Depending on the needs of your agency, your actual field values and the number of status entries might vary. For more information on setting up Workflow, see the *Application Setup and Maintenance Manual* and the *Mobile Administration Manual*.

To set up workflow for submitting forms electronically:

1. Open the Workflow Status Configurations screen (`wfstatcf`).
2. Click **Add**.
3. Complete the **Workflow Status Configurations** area as appropriate for the agency and form.
4. In the **Status Code Sequence** area, click **Detail**.

   The Workflow Status Configuration Codes detail window opens.
5. Add the first workflow status. Complete the following fields:
   – **Abbr**: Leave this field blank.
   – **Description**: Enter **`No Status`**.
   – **Action**: Enter **`1`**. The value entered must be positive.
   – **Next Status**: Enter **`INPUT`**.
6. Add the next status. Complete the following fields:
   – **Abbr**: Enter **`INPUT`**. This value must match the value entered in the **Next Status** field in step 5.
   – **Description**: Enter a description for the status, such as **`Input Information into Record`**.
   – **Action**: Enter **`1`**. The value entered must be positive.
   – **Next Status**: Enter **`FAIL`**.
7. Add the next status. Complete the following fields:
   – **Abbr**: Enter **`SENDST`**. This value must match the **Next Status** field value entered in step 6.
   – **Description**: Enter a description for the status, such as **`Statute submission failed`**.
   – **Action**: Enter **`1`**. The value entered must be possitive

– **Next Status**: Enter **`SENDST`**.

8. Add the next status. Complete the following fields:
   – **Abbr**: Enter **`SENDST`**. This value must match the **Next Status** field value entered in step 6.

   – **Description**: Enter a description for the status, such as **`Send to State`**.

   – **Action**: Enter **`-2`** to submit to ecommerce or **`-3`** to submit to both the state and ecommerce. The value entered must be negative.

NOTE

If your state uses electronic submission, in the **Action** field enter **`-1`**.

– **Next Status**: Enter **`COMPLT`**.

9. Add the final workflow status entry for workflow completion. Complete the following fields:
   – **Abbr**: Enter **`COMPLT`**. This value must match the **Next Status** field value entered in step 7.

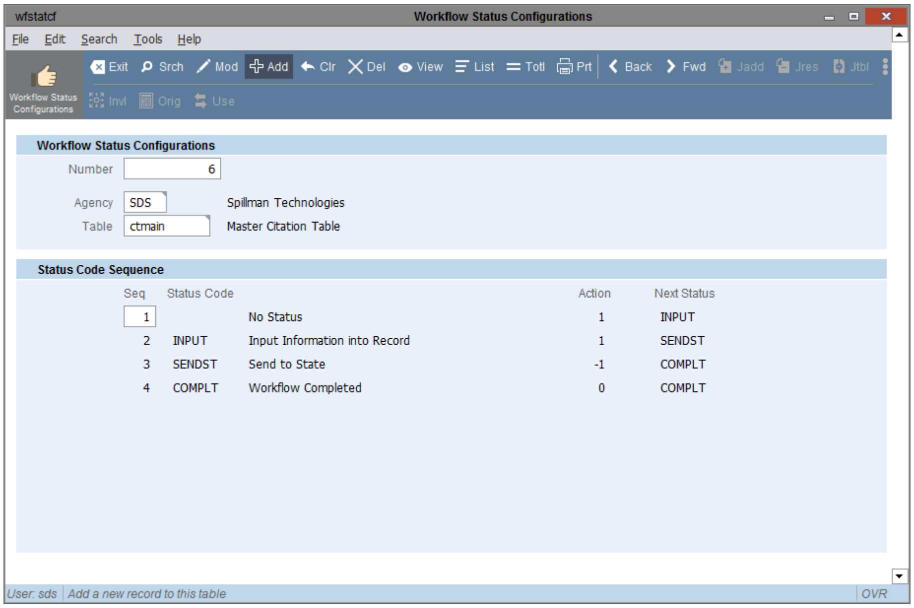
   – **Description**: Enter a description for the status, such as **`Workflow Completed`**.

   – **Action**: Enter **`0`**.

   – **Next Status**: Enter **`COMPLT`**.

10. Click **Accept** to accept your changes.
11. Click **Exit** to close the Detail window and return to the Workflow Status Configurations screen.

12. Click **Accept** to save the record.



The following occurs:

– If a submission succeeds, then the workflow is moved to the next workflow status, and the assignee is unchanged.

– If a submission fails, then it is moved back to the previous workflow status, and assigned to the person who received the response from the state.

– The response from the state is displayed in the comments section of the workflow. The response is also in the **State Returns** folder for the user in the Message Center.

– Errors, warnings, and messages returned from the state are sent to the user, who corrects the problem and resubmits the form.

Modifying the Auto-Save Default Settings

By default, if there are unsaved changes to the form, then a draft of the electronic form is saved every 30 seconds. However, the default time can be modified in the `options.xml` file settings.

> **NOTE**
> It is not recommended to modify the auto-save default time to less than 30 seconds.

To modify the auto-save default time:

1. Access the `options.xml` file. For more information, see the *Mobile Administrator Manual*.
2. Search for the `<DraftAutoSaveTimeOut>` tag.
3. Change the value to an integer that represents the minutes in seconds. For example, to save a draft every two minutes, enter **`120`**.
4. Save a copy of the file to the uclient directory to avoid overriding changes when patches are applied.

Changing the Form Names

If desired, your agency can change the form names in the Field Reports screen from the defaults.

To change the form names in the Field Reports screen:

1. Access the `FR.xml` file.
   - For Windows, from the File Explorer, navigate to the directory

     `\\SpillmanServer\app\mobile\client\`
     `*stateabbreviation*fr\stateforms\forms`

     where *stateabbreviation* is the abbreviation for your state.
   - For UNIX or Linux, see "Accessing the FR.xml file with UNIX or Linux" on page 68.
2. Search for the `<FormDescName>` tag. For example, `<FormDescName>FR Citation</FormDescName>`.
3. Change the form name between the beginning and ending tags.
4. Save a copy of the file to the uclient to avoid overriding changes when patches are applied.

Accessing the FR.xml file with UNIX or Linux

To access the `FR.xml` file for UNIX or Linux:

1. At the command line, enter **`sh`**.

   The Terminal Emulator window opens.

> **NOTE**
>
> All commands are case sensitive.

2. At the prompt line, enter the following:
   `cd $MOBILEDIR/client/`*`stateabbreviation`*`fr/`
   `stateforms/forms`

   where *stateabbreviation* is the abbreviation for your state.
3. At the prompt line, enter **`vi FR.xml`**

   The `FR.xml` style sheet is displayed in the User Interface (UI) editor.

Setting Up eSign for Android

To use eSign for Android devices, the following tasks must be completed:

- "Enabling eSign" on page 69
- "Setting up a PIN for the eSign application" on page 70
- "Setting the text for the Signature area" on page 71
- "Installing the eSign application on an Android device" on page 71

> **NOTE**
>
> eSign for Android does not work in Offline mode. If connection to the server is lost during the citation process, then the eSign application fails to find a citation or upload a signature.
>
> The process for setting up the eSign application for Android is not the same process as setting up the eSign feature for Flex. For more information on setting up the eSign feature for Flex, see the *Application Setup and Maintenance Manual*.

Enabling eSign

To enable eSign for Android:

1. Access the `FR.xml` file.
   - For Windows, from the File Explorer, navigate to the directory

     `\\SpillmanServer\app\mobile\client\`
     `*stateabbreviation*fr\stateforms\forms`

     where *stateabbreviation* is the abbreviation for your state.
   - For UNIX or Linux, see "Accessing the FR.xml file with UNIX or Linux" on page 68.
2. Locate the `<SignTabEnabled>` tag.
3. Do one of the following:
   - To enable eSign with Android, enter **`True`** between the beginning and ending tags.
   - To disable eSign with Android, enter **`False`** between the beginning and ending tags. By default, the value is **`False`**.
4. Save a copy of the file to the uclient directory to avoid overriding changes when patches are applied.

Setting up a PIN for the eSign application

To set up a PIN for the eSign application:

1. At the command line, enter **`tbagtype`**.

   The Agency Misc Information Type screen opens.

2. To require a PIN at login, do the following:
   - Click **Add**.
   - In the **Code** field, enter **`STREQ`**.
   - In the **Description** field, enter **`Require PIN at login`**.
   - Click **Accept**.

   The `STREQ` code is added to the drop-down list for the **Misc Code** field on the Agency Codes table (`apagncy`).

3. To set the PIN for the application, do the following:
   - Click **Add**.
   - In the **Code** field, enter **`STPASS`**.
   - In the **Description** field, enter **`eSign PIN`**.
   - Click **Accept**.

   The `STPASS` code is added to the drop-down list for the **Misc Code** field on the Agency Codes table (`apagncy`).

4. Close the Agency Misc Information Type screen.
5. Open the Agency Codes table (`apagncy`), and locate your agency's record.
6. In the **Misc Info** field, click **Detail** to open the Miscellaneous Information detail window.
7. Do the following:
   - Click **Add**.
   - In the **Misc Code** field, select **`STREQ`** from the drop-down list.
   - In the **Value** field, enter **`Yes`** to require a user to enter a PIN. Enter **`No`** to not require a user to enter a PIN.
   - Click **Accept** to save the detail record.
8. Do the following:
   - Click **Add**.
   - In the **Misc Code** field, select **`STPASS`** from the drop-down list.
   - In the **Value** field, enter the desired PIN for the application.

– Click **Accept** to save the detail record.

9. Click **Exit** to close the detail window.
10. Click **Accept** to save your changes to the record.

Setting the text for the Signature area

This process does not apply to the **Signature** area for eSign for Windows. To set the **Signature** area for eSign for Windows, see "Setting the text for the Signature area" on page 74.

To set the text for the **Signature** area:

1. Access the `FR.xml` file.
   – For Windows, from the File Explorer, navigate to the directory

     `\\SpillmanServer\app\mobile\client\`
     `*stateabbreviation*fr\stateforms\forms`

     where *stateabbreviation* is the abbreviation for your state.
   – For UNIX or Linux, see "Accessing the FR.xml file with UNIX or Linux" on page 68.
2. Search for the `<ViolatorMessage>` tag.
3. Enter the desired text between the beginning and ending tags. Set the text according to the requirements for your state.
4. Save a copy of the file to the uclient directory to avoid overriding changes when patches are applied.

Installing the eSign application on an Android device

To install the eSign application on an Android device:

1. Because the eSign application is not located in a known app store, such as Google Play, adjust the settings on the device to allow downloads from unknown sources. For more information, consult the user documentation for the device.
2. Download the provided eSign Android application package (APK) to your device by doing one of the following:
   – Place the eSign APK in a location on the server that can be accessed by a URL. From the device, navigate to the URL and download the package. If prompted to download the application to the device, tap **Yes** or **OK**. Otherwise, navigate to the downloads folder on the device to select the APK and start the installation.

- Place the eSign APK in a folder on your computer, and then connect the device to the computer using a USB cable. From the computer, transfer the APK file to the device. A third-party application might be required to transfer the file. From the device, select the APK and start the installation.

The application is installed.

> **NOTE**
> When installation is complete, the setting to allow downloads from unknown sources can be turned off.

3. Pair your device with your computer so that the eSign application can communicate with the Mobile form. The computer must be able to communicate via Bluetooth® wireless technology.

Setting Up eSign for Windows

To use eSign for Windows, the feature must be enabled in the `FR.xml` file and the text for the **Signature** area must be specified. Complete the following tasks.

- "Enabling eSign" on page 73
- "Setting the text for the Signature area" on page 74

Enabling eSign

To enable eSign for Windows:

1. Access the `FR.xml` file.
   – For Windows, from the File Explorer, navigate to the directory

     `\\SpillmanServer\app\mobile\client\`
     `stateabbreviation``fr\stateforms\forms`

     where *stateabbreviation* is the abbreviation for your state.
   – For UNIX or Linux, see "Accessing the FR.xml file with UNIX or Linux" on page 68.
2. Locate the <`WindowsESignEnabled`> tag.
3. Edit the value between the beginning and ending tags.
   – To enable eSign for Windows, set the value to **`True`**.
   – To disable eSign for Windows, set the value to **`False`**. By default, the value is `False`.
4. Save a copy of the file to the uclient directory to avoid overriding changes when patches are applied.

Accessing the esignmessages.xml file for UNIX or Linux

To access the `esignmessages.xml` file for UNIX or Linux:

1. At the command line, enter **`sh`**.

   The Terminal Emulator window opens.

> **NOTE**
>
> All commands are case sensitive.

2. At the prompt line, enter the following:

   `cd $MOBILEDIR/client/fr/stateforms/codes`

The available XML files are listed.

3. At the prompt line, enter the following:

   `vi esignmessages.xml`

   The `esignmessages.xml` file is displayed.

Setting the text for the Signature area

This process does not apply to the **Signature** area for eSign for Android. To set the **Signature** area for eSign for Android, see "Setting the text for the Signature area" on page 71.

To set the text for the **Signature** area:

1. Open the `esignmessage.xml` file.
   - For Windows, navigate to the following directory:

     ```
     \\SpillmanServer\app\mobile\client\fr\stateforms
     \codes\esignmessages.xml
     ```
   - For UNIX or Linux, see "Accessing the esignmessages.xml file for UNIX or Linux" on page 73.
2. Edit the value between the `<desc>` beginning and ending tags to the desired violator message.
3. Save a copy of the file to the uclient directory to avoid overriding changes when patches are applied.